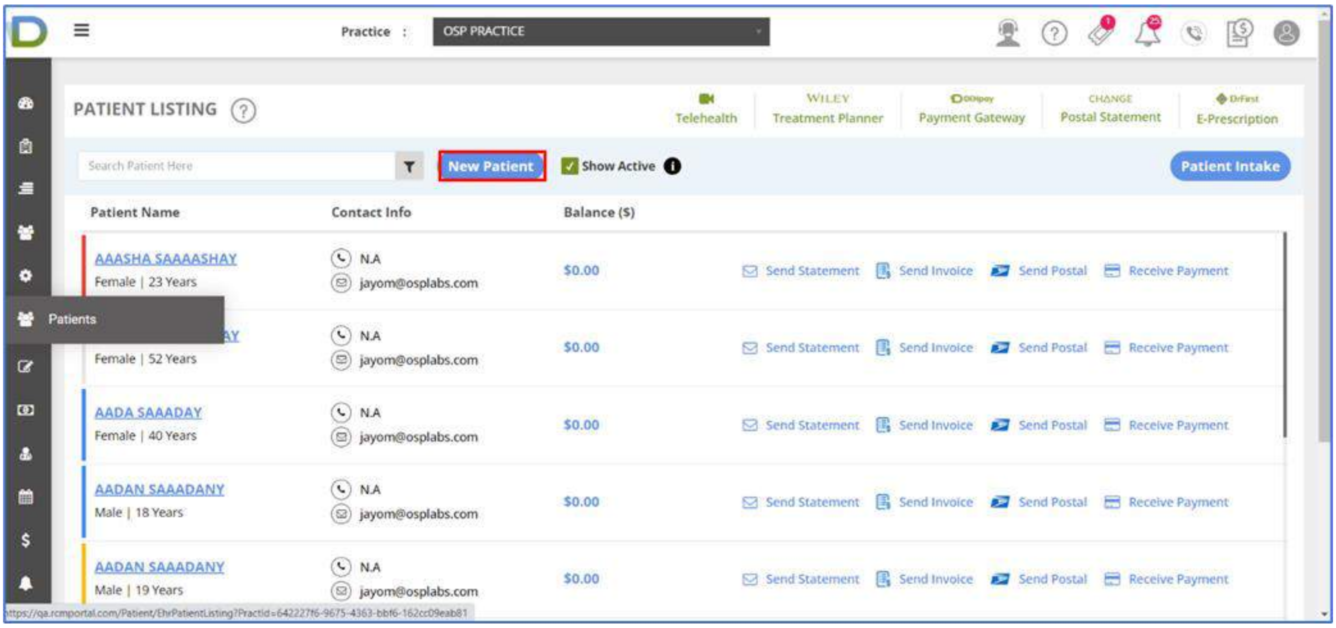
# Add New Patient  and Intake Form:

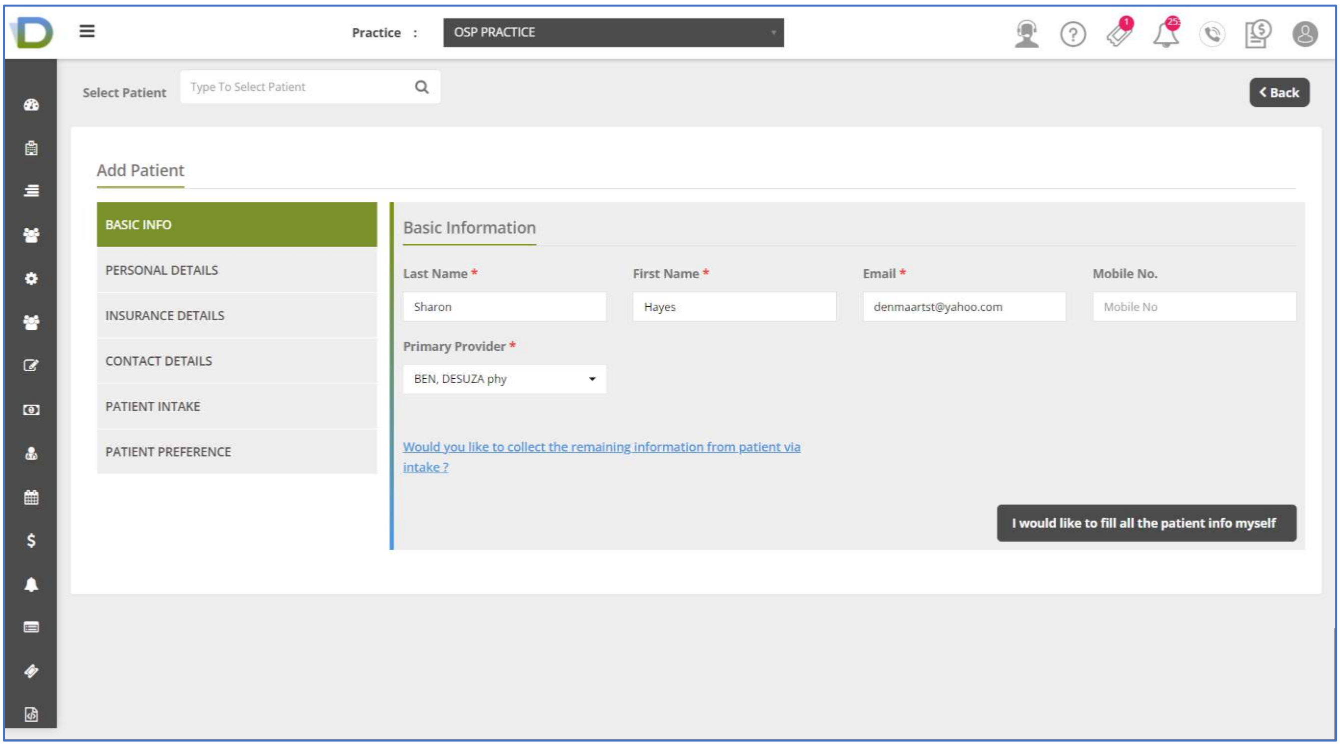
New Patient can be added  in RCM using this feature

Following are the steps to Add New Patient

- From Patients icon in menu
- Click on Add “**New Patient**” button




Creating new patient from RCM




- ➢ User will have to fill basic Information of Patient when creating new patient
- ➢ First name , Last Name & Primary Provider details are mandatory

**Note:**

1. Adding First Name , Last Name ,Email & Primary Provider, New Patient can be created on Submit
2. If Patient do not have email Id then user will have to go through 2nd option "I would like to fill all the patient info myself"

Below are the options for user as per his preference

1. **Would you like to collect the remaining information from patient via intake?**
2. **I would like to fill all the patient info myself**

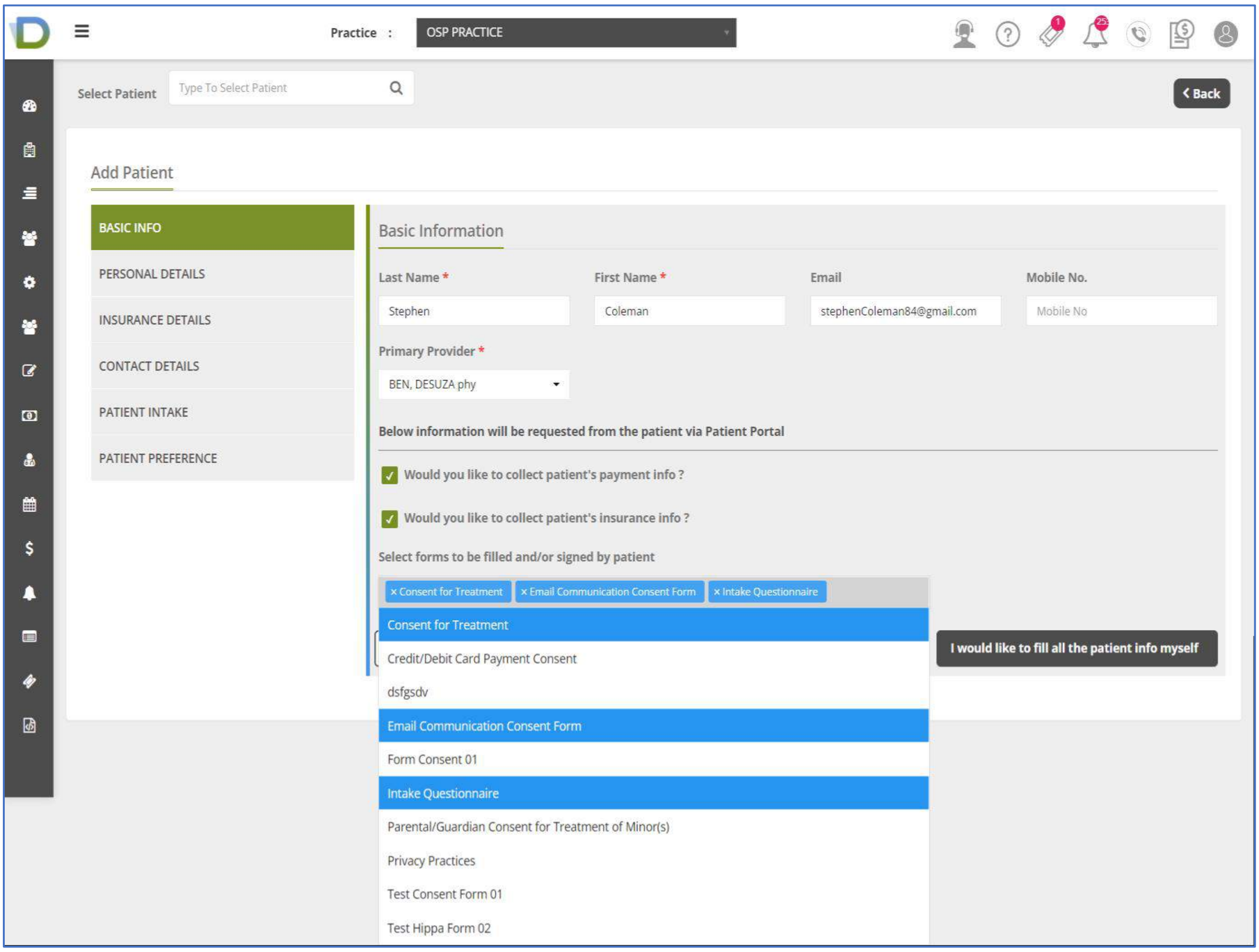
1. Clicking on link: **Would you like to collect the remaining information from patient via intake?**

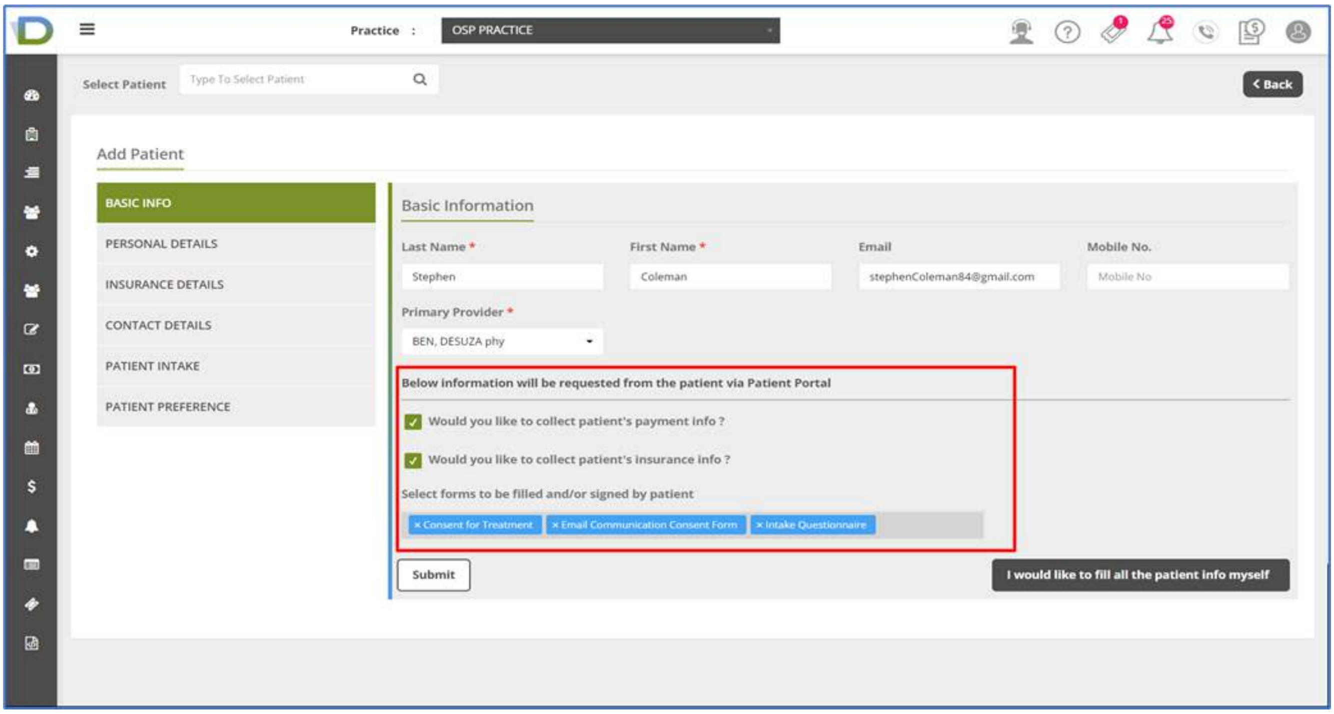
   Will give multiple options to take patients information through patient portal

   a) Would you like to collect patient's payment info?

   b) Would you like to collect patient's insurance info?

   c) Select forms to be filled and signed by patient



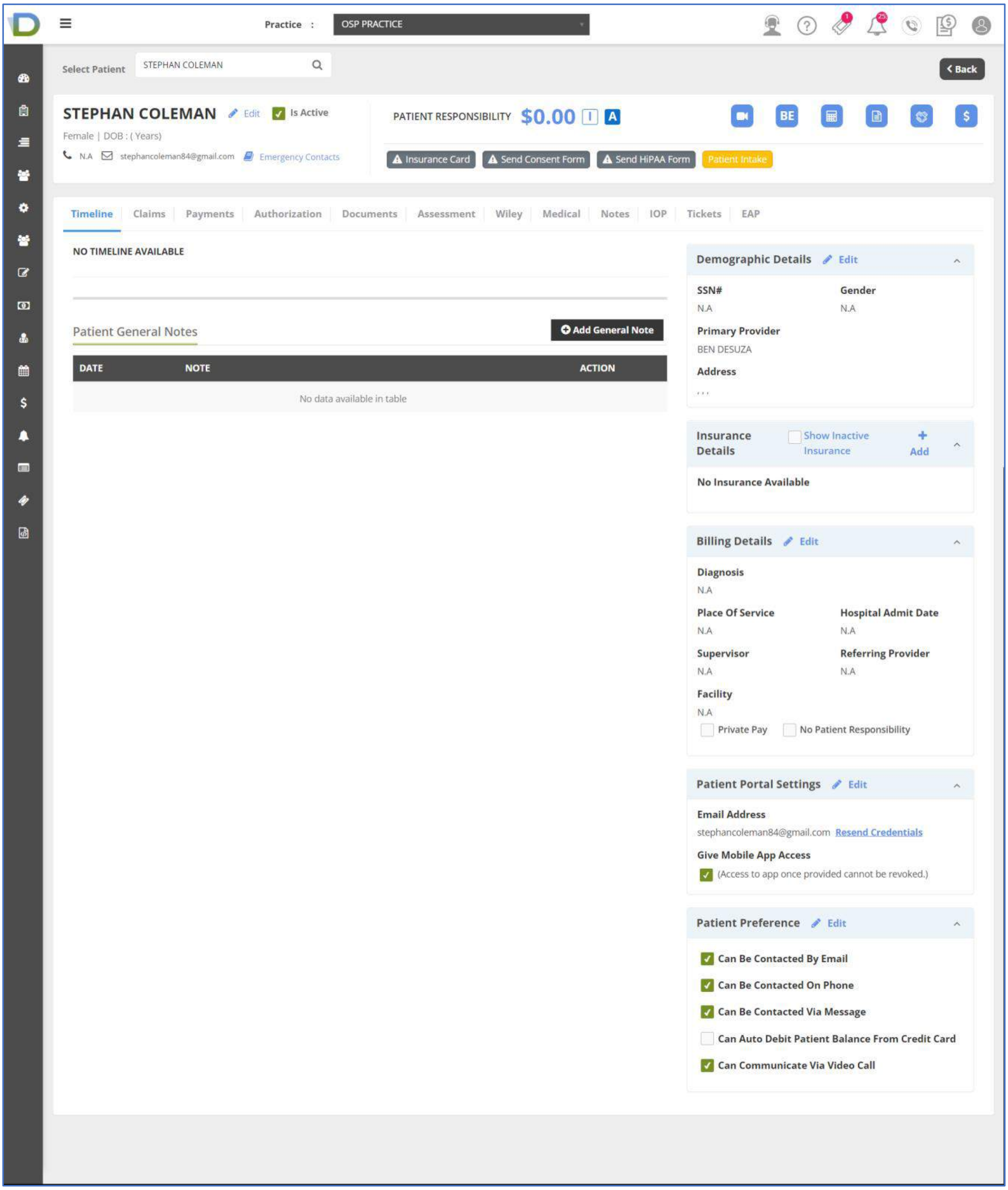



- ✓ If user wants to collect Patient's Payment or Insurance Information then he/she can check below options
  - o Would you like to collect patient's payment info?
  - o Would you like to collect patients insurance info?
- ✓ If user wants to send any form to patient to be filled than he/she can select multiple forms using below option
  - o Select forms to be filled and/or signed by patient

    [Note: Other Forms can be created using Form Builder
    - From Form builder icon in menu
    - Click on Add Form
    - Select document type and enter form name to create
    - User can drag and drop the fields as required to create form
    - Label , position and place holder can be added [Preview will be shown]
    - Click on Save button ]

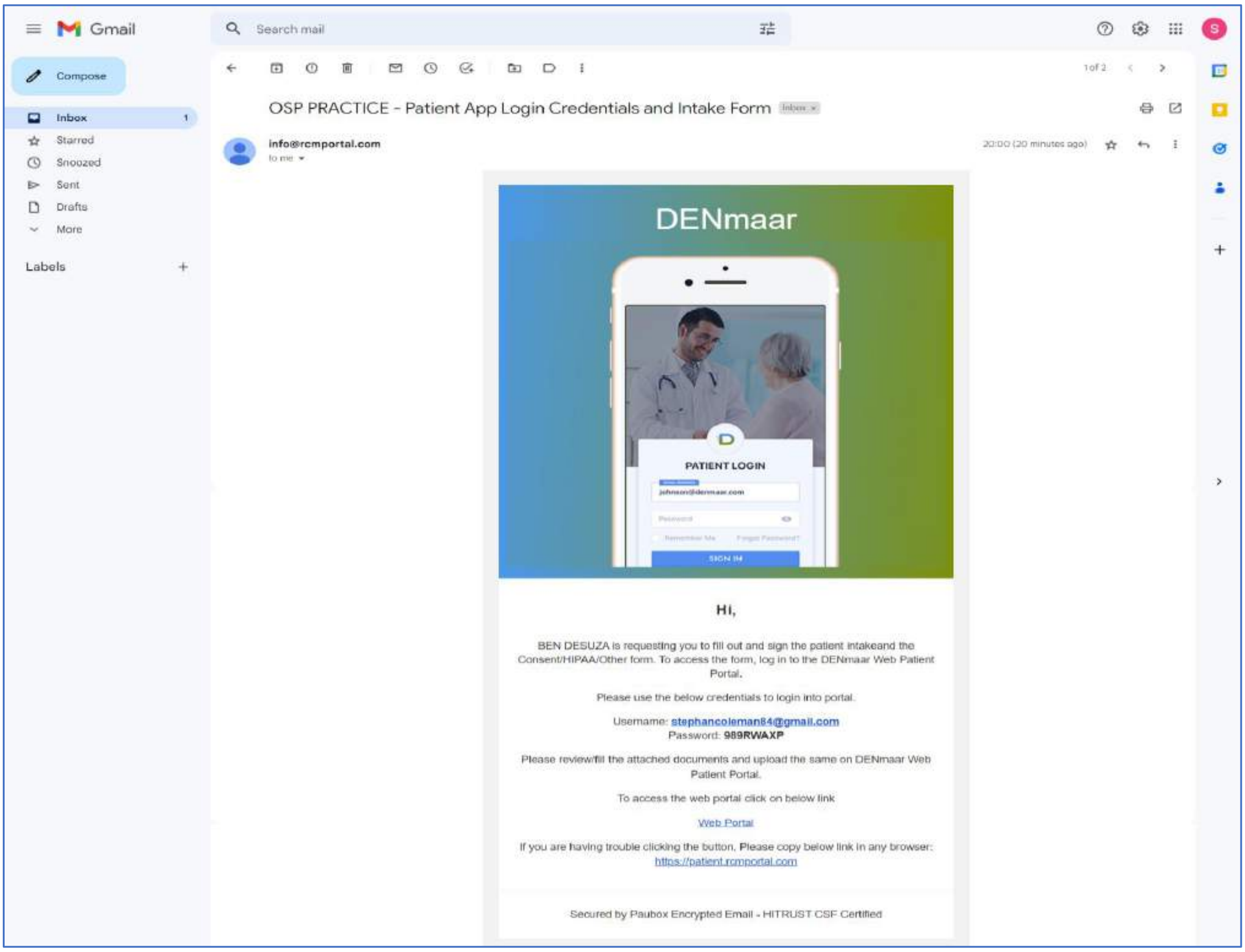
- ✓ User can fill basic information and other information to be filled can be send to patient through patient portal selecting above options and click on **Submit** button

New Patient  created in RCM.



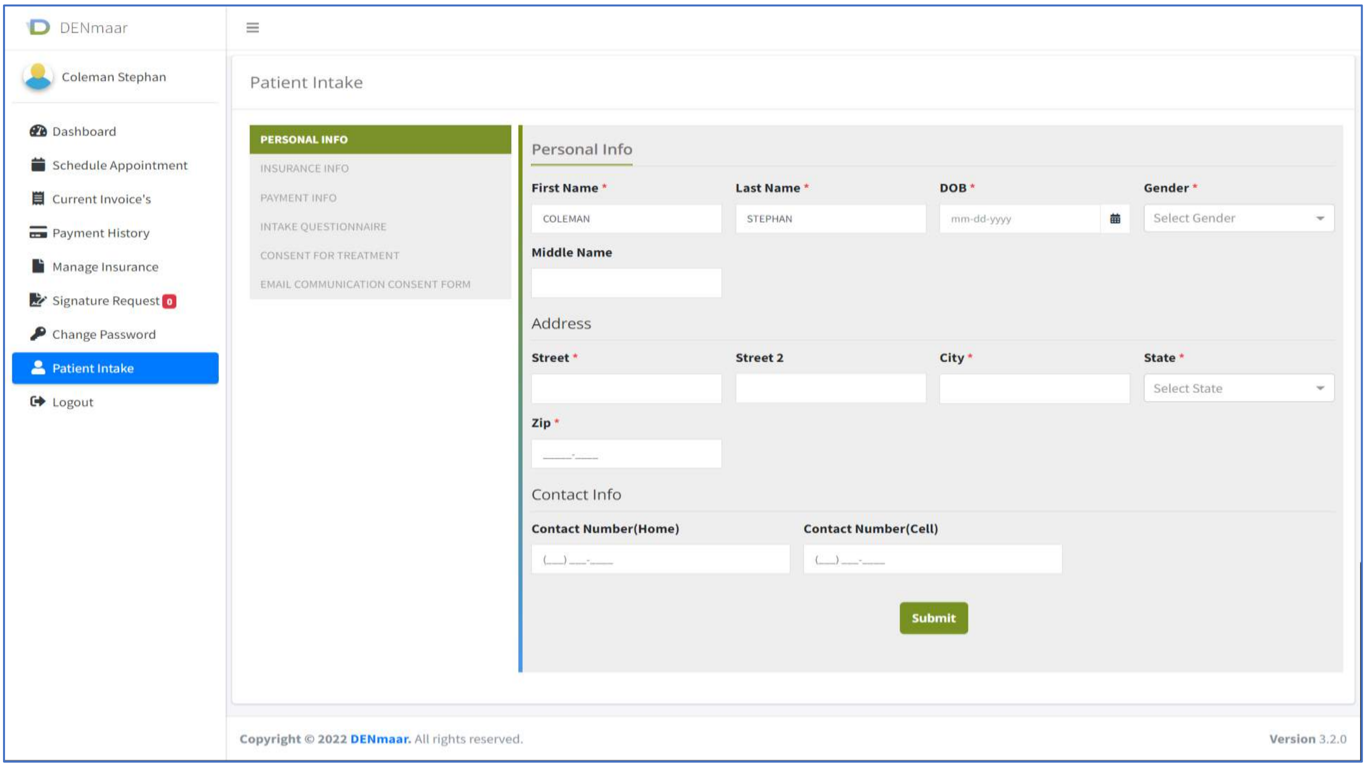
a) **Patient Portal flow :** [for point 1. Would you like to collect the remaining information from patient via intake? ]

- ➢ After creating new patient in RCM , Patient will receive email with Patient portal credentials with Patient portal link , Username & Password
- ➢ Patient will have to login into patient portal using that portal details

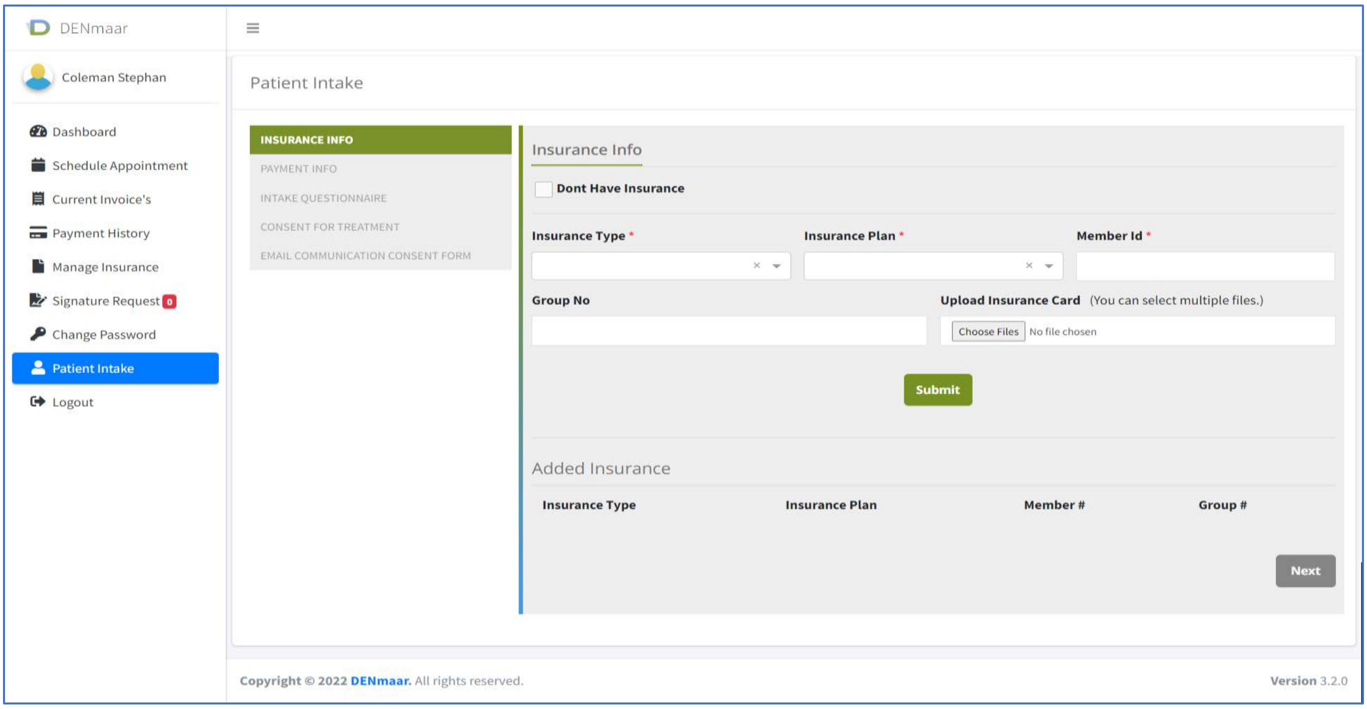



- ➢ After logging into Patient portal , user will be redirected to Patient Intake page where patients will be able to access the sent forms from RCM

- ➢ User will be able to see Personal Info , Insurance Info & other selected forms

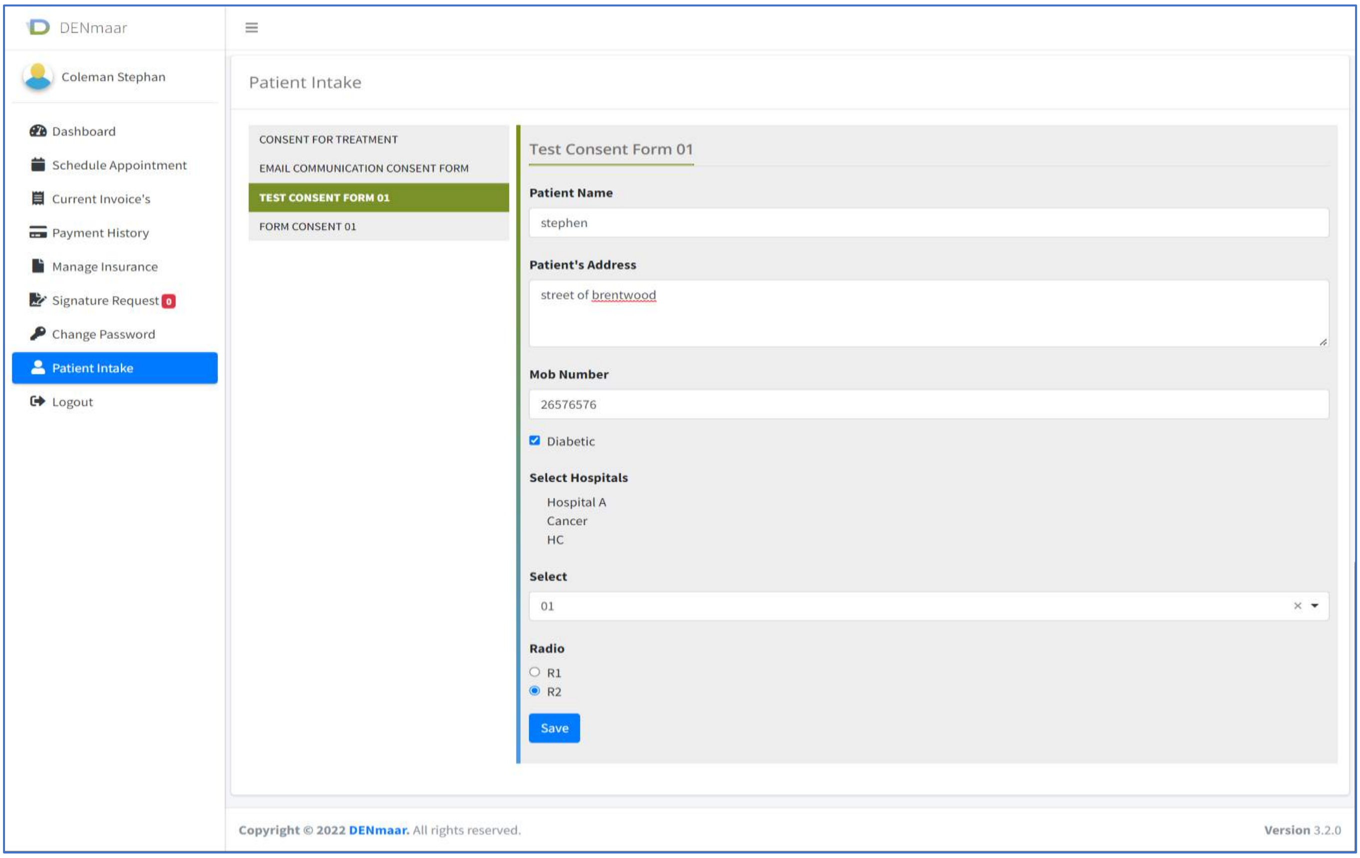



- ➢ Once Personal Info is submitted by User , Insurance Info[next form] Form will be displayed




- ➢ After submission of Insurance Info & Payment Info , Other Forms will be enabled for user to submit

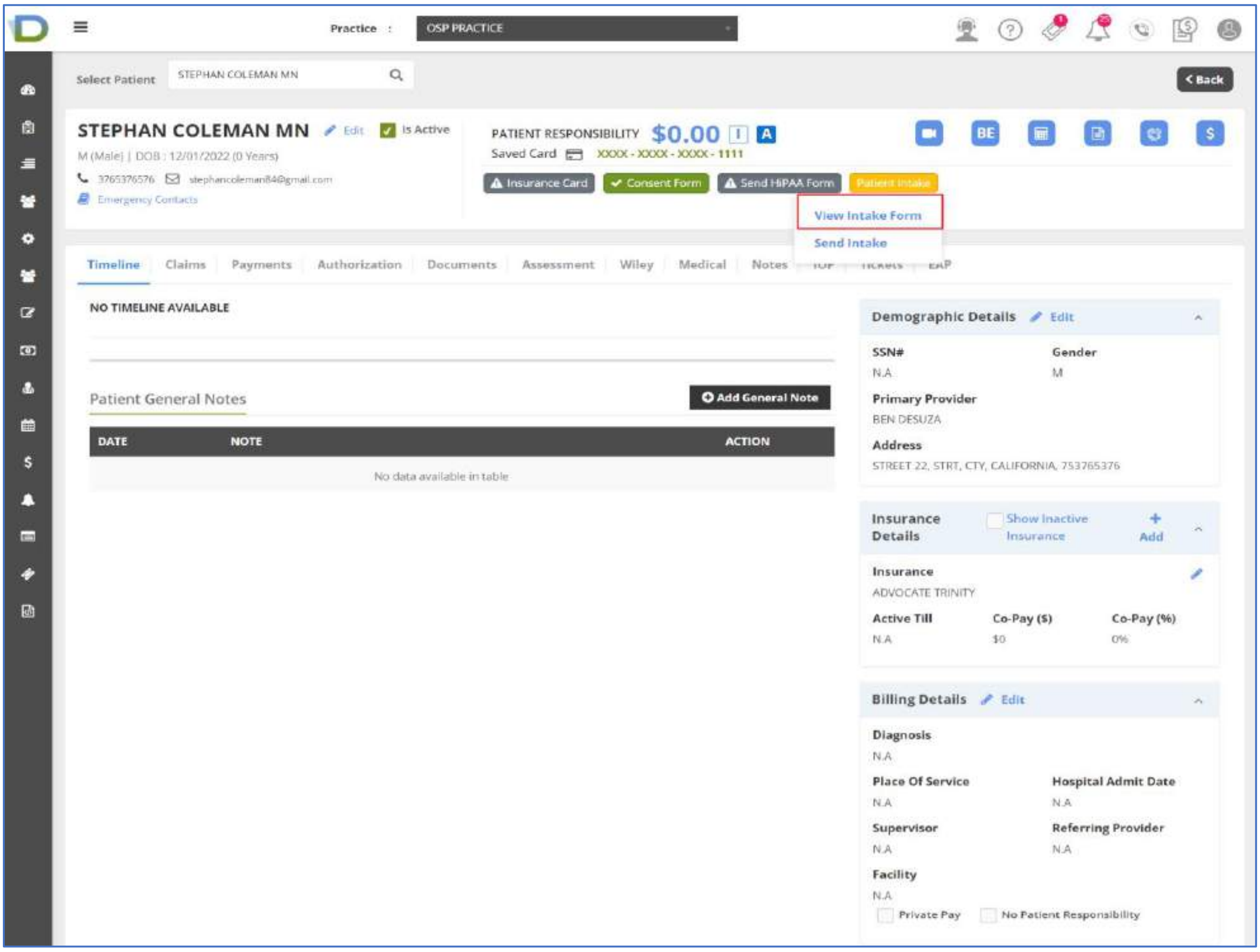
- User can submit all forms from Patient portal

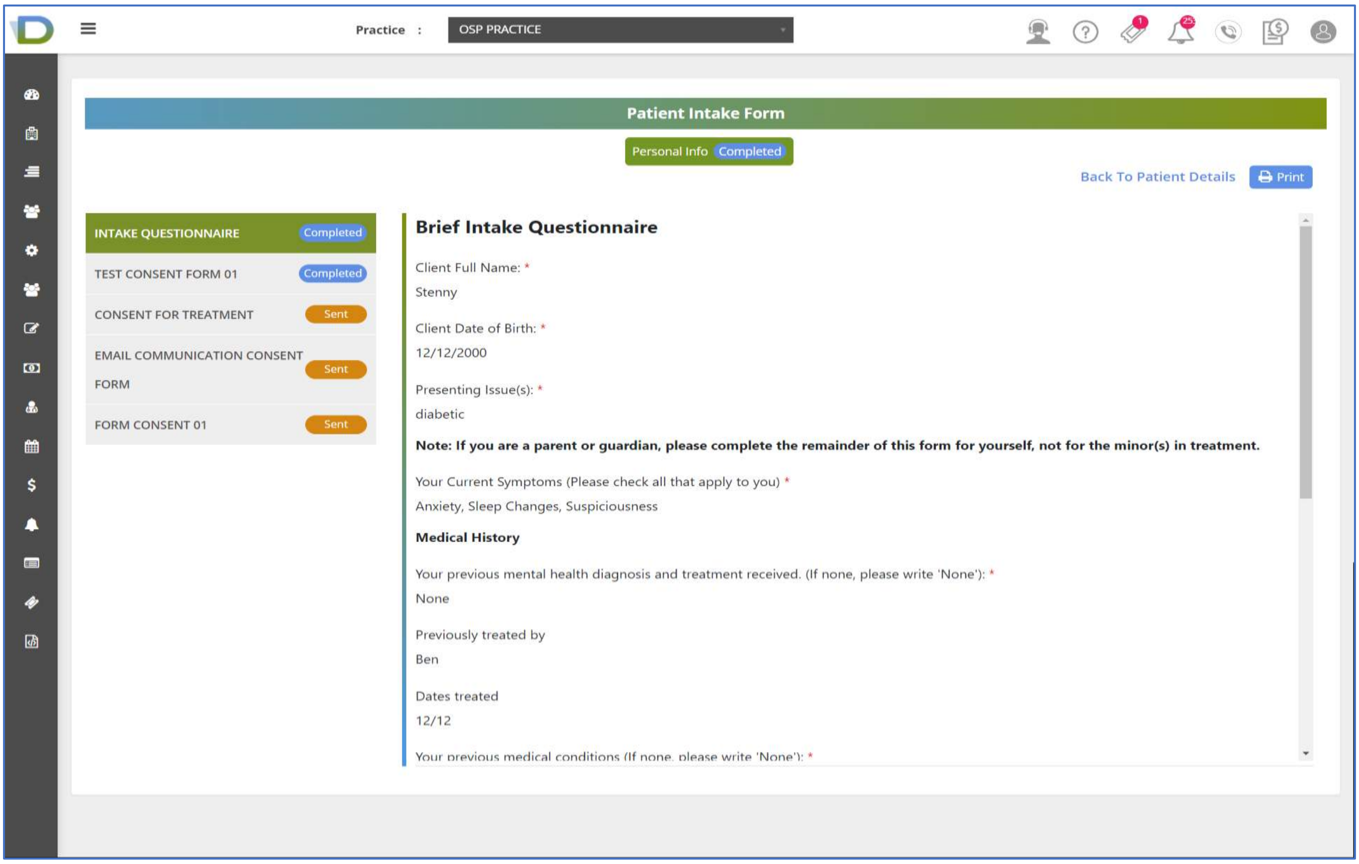


## After submission from Patient Portal

If you want to review which all forms have been submitted by patient from patient portal

- In RCM – Go to Patient's Demographics
- Click on Patient Intake -> View Intake Form

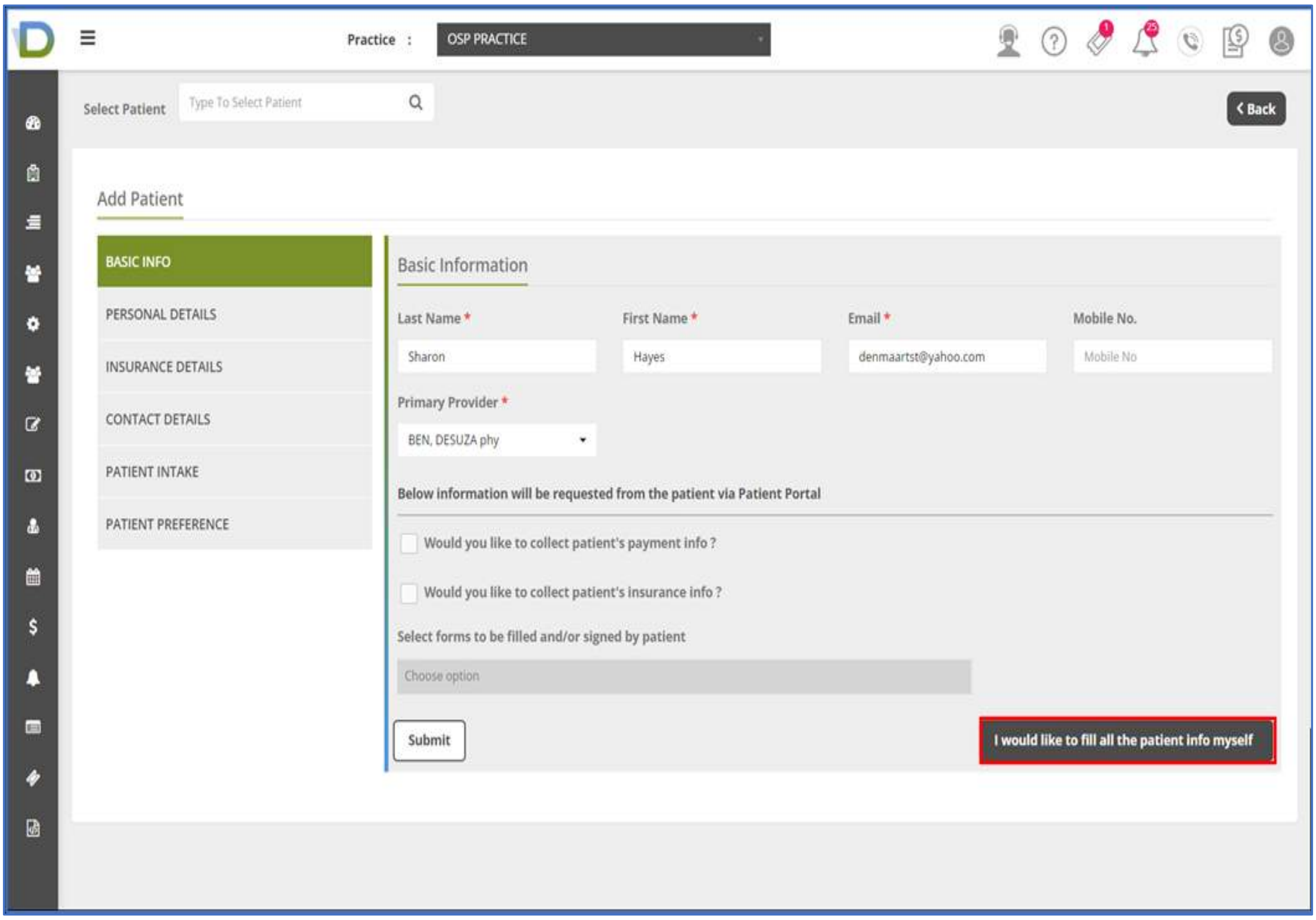





- Information Submitted from portal gets updated in Patient Intake Form
- Forms submitted from Patient portal will be in completed status & Pending forms will be in Sent status
- User can print the submitted forms

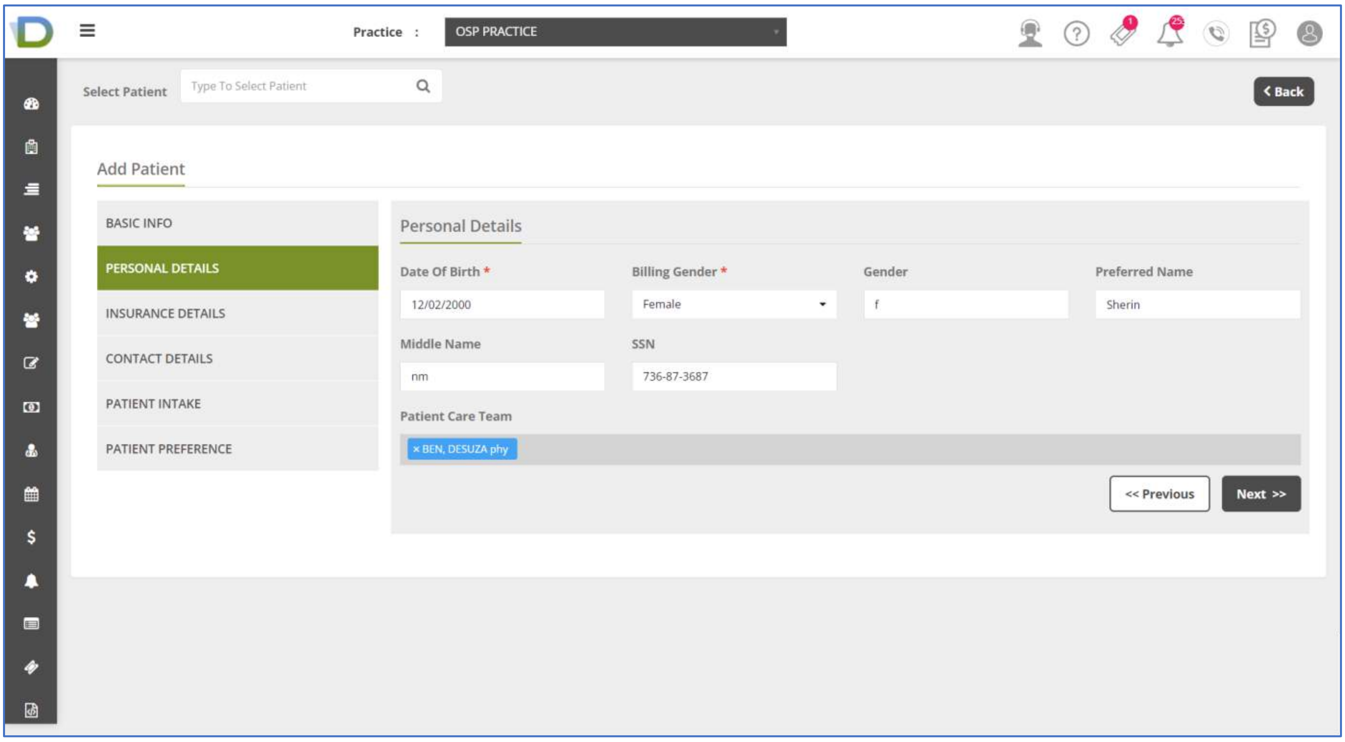
---

2. User can use option “**I would like to fill all the patient info myself**” and fill all patient’s details
    1. Basic Info
    2. Personal Details
    3. Insurance Details
    4. Contact Details
    5. Patient Intake
    6. Patient Preference



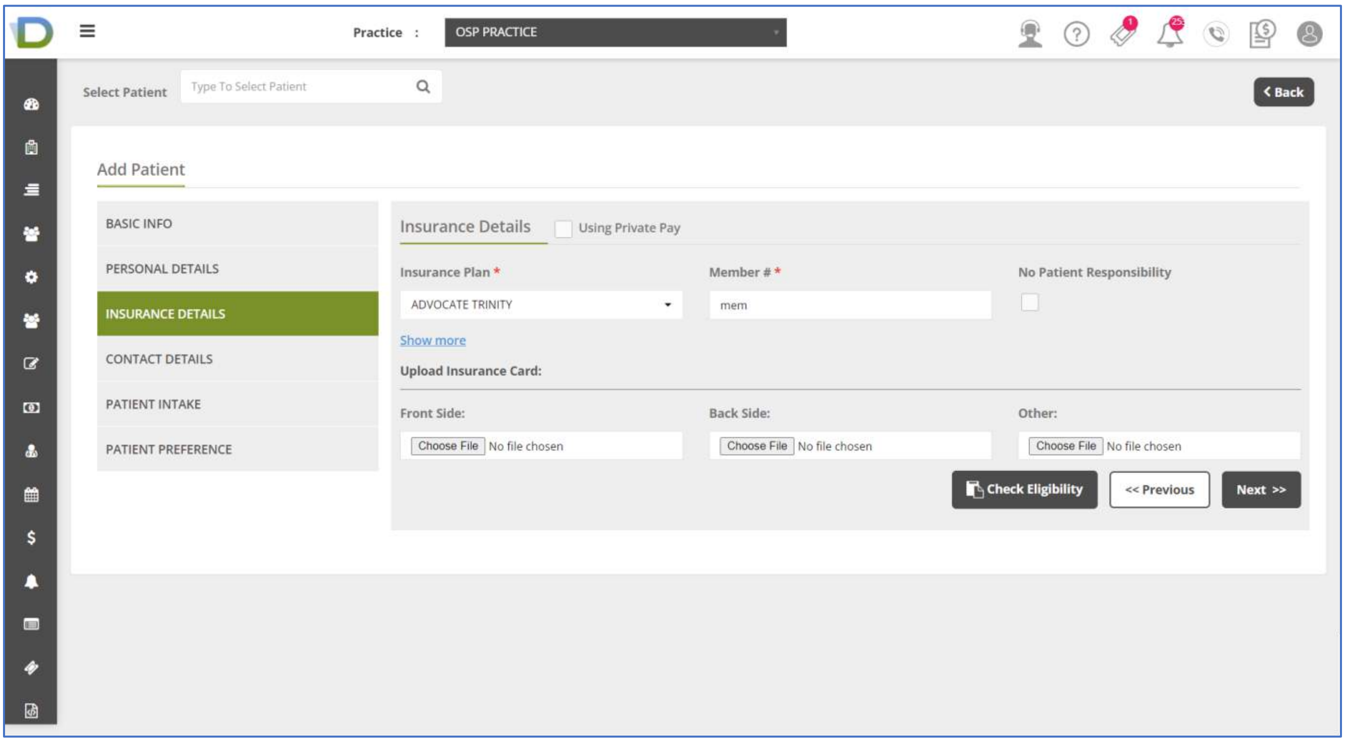
## Personal Details :

- ➢ User can fill personal details of patient



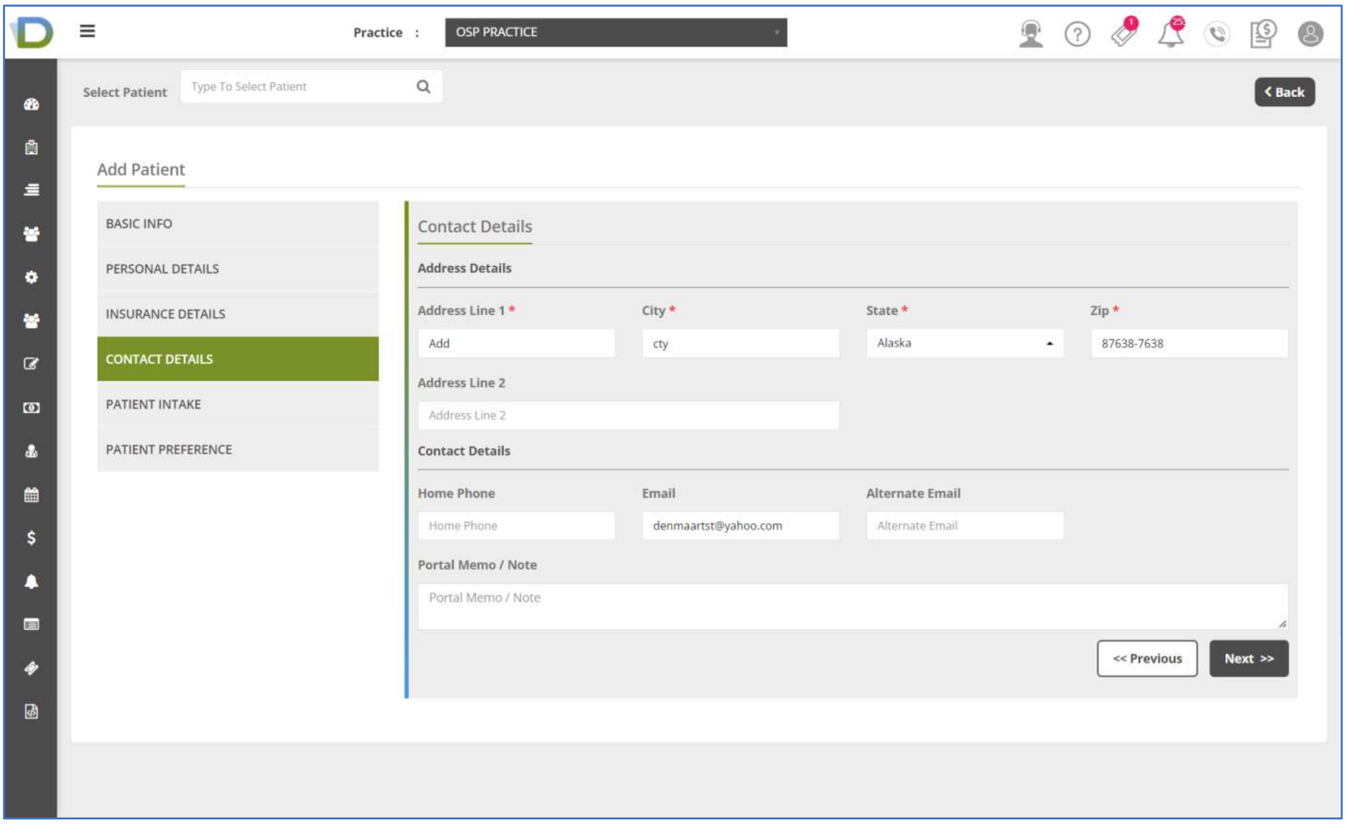

## Insurance Details:

- ➢ User can fill insurance info of Patient
- ➢ Insurance Plan and Member fields are mandatory



**Contact Details**:

- User can fill all contact Details of Patient
- Address Line 1 , City , State & Zip are Mandatory



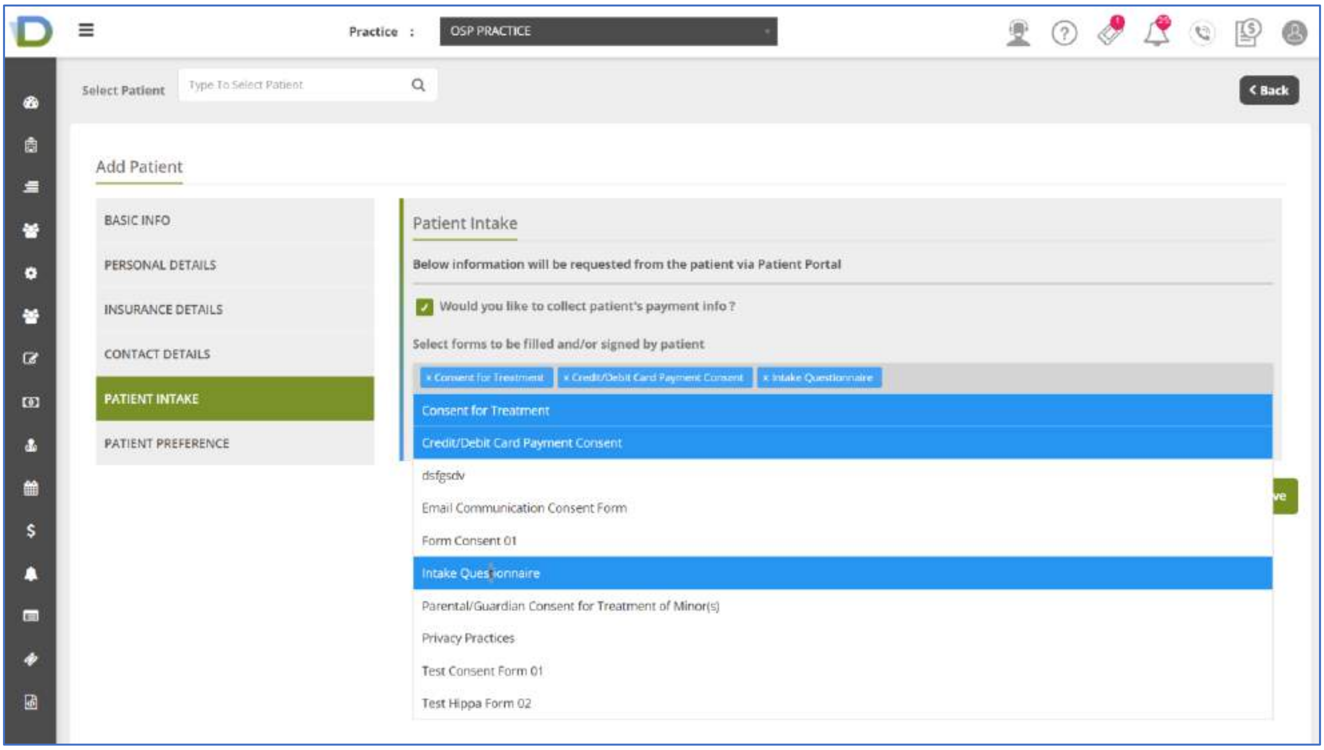

**Patient Intake**:

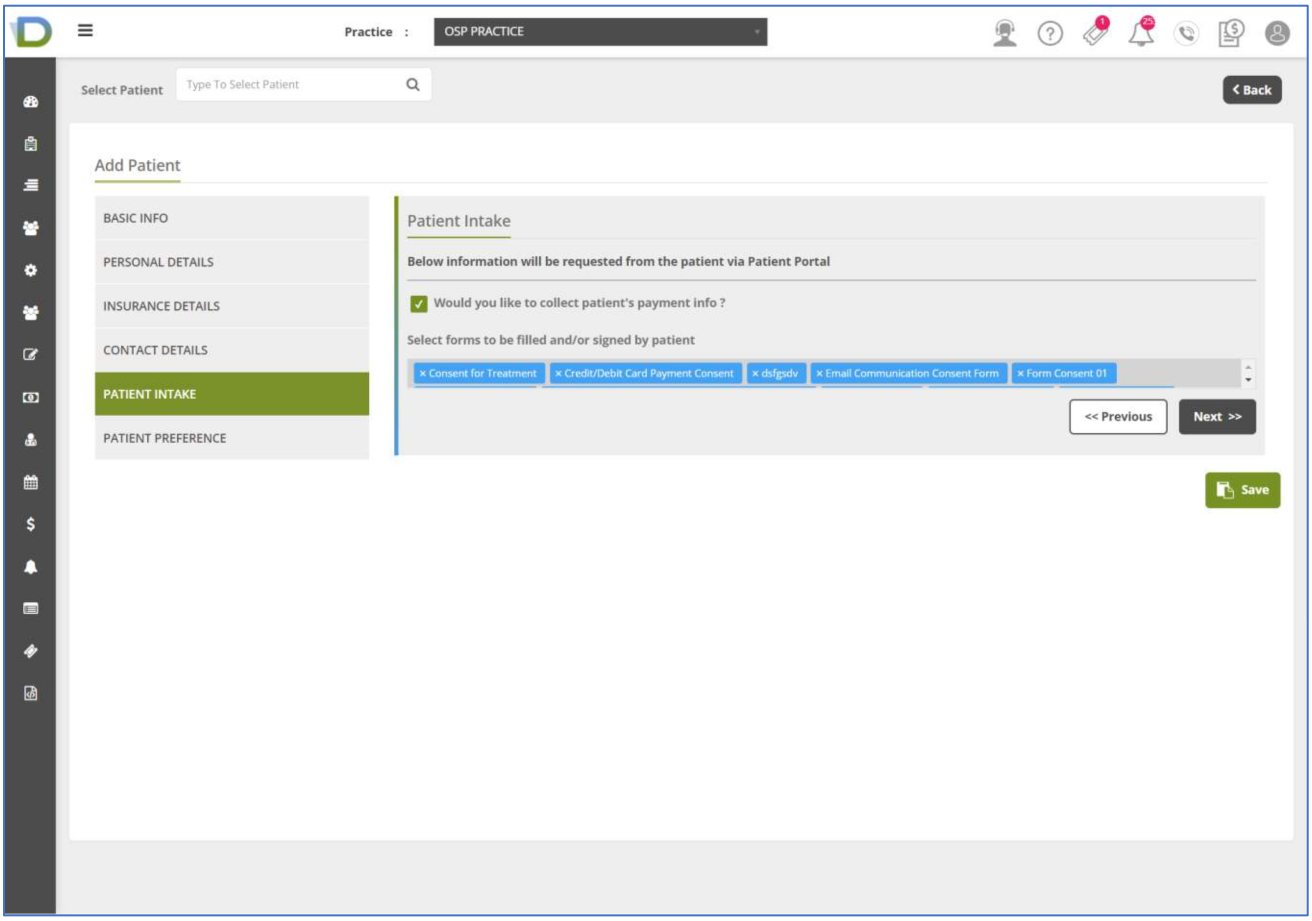
- User can send Patient's Payment form and also select other forms to be filled by patient through patient portal [Email is required when you want to send intake forms]

  [Note: Other Forms can be created using Form Builder

  - From Form builder icon in menu
  - Click on Add Form
  - Select document type and enter form name to create
  - User can drag and drop the fields as required to create form
  - Label , position and place holder can be added [Preview will be shown]
  - Click on Save button ]

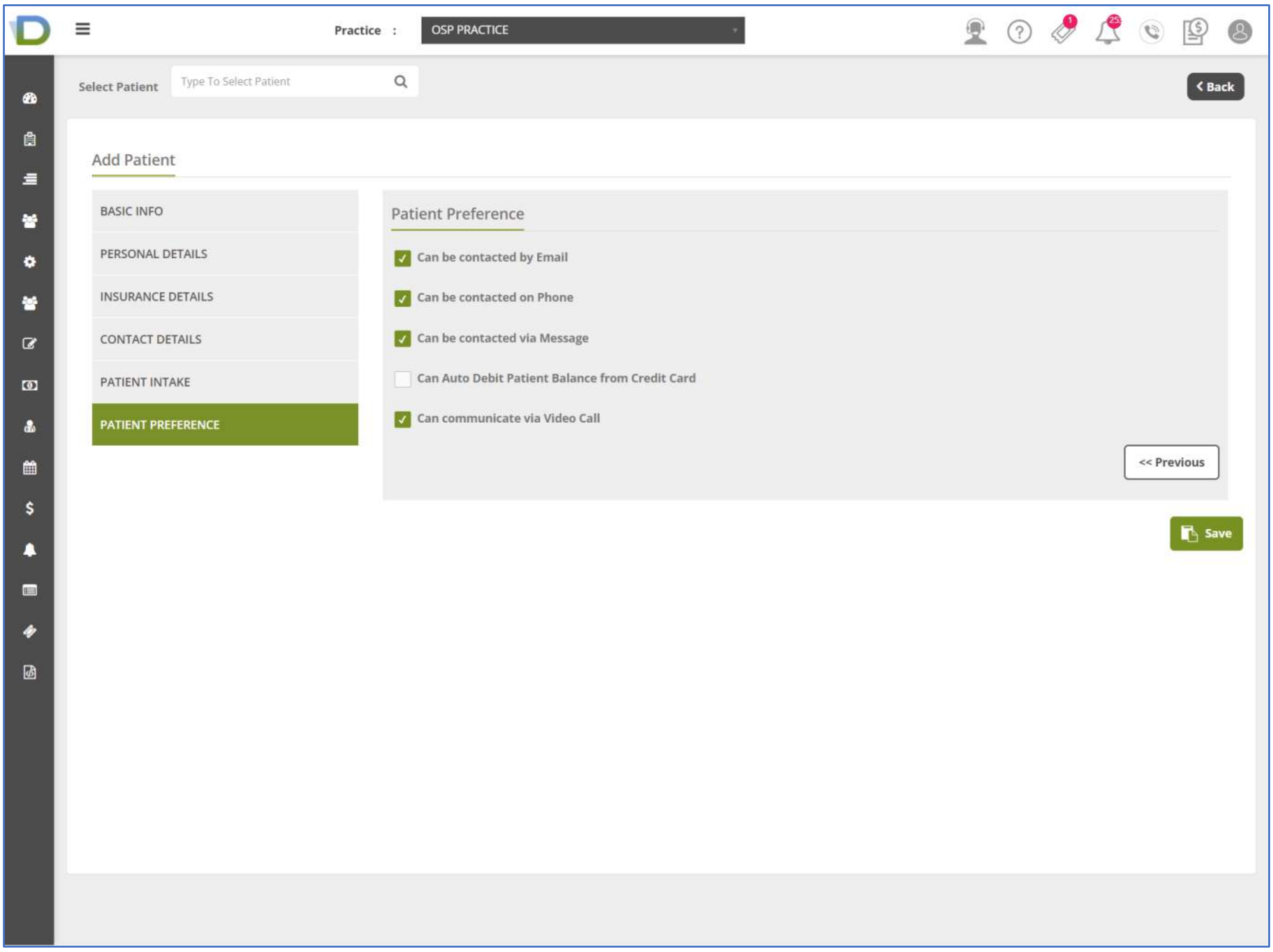
Patient Intake form:



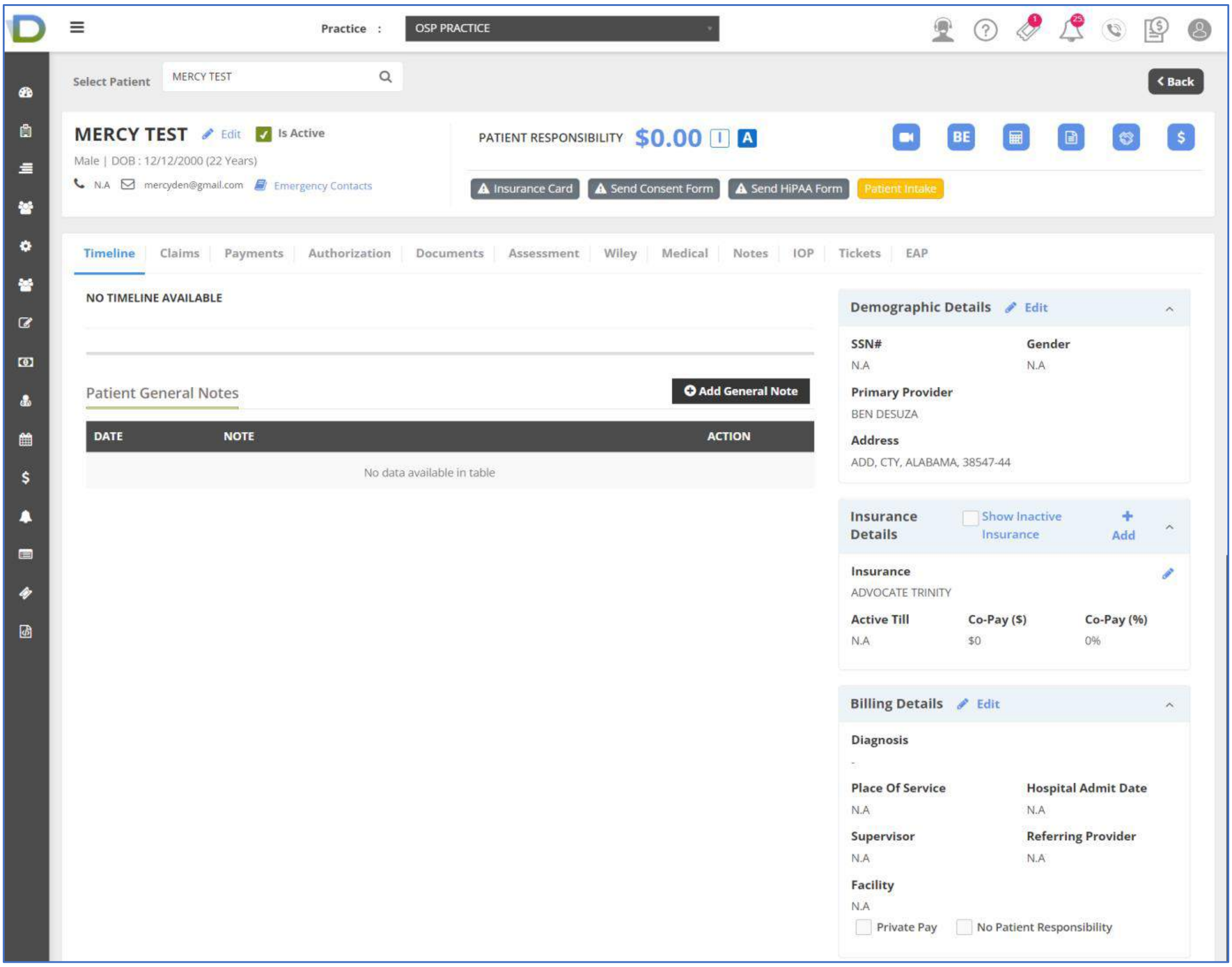
**Patient Preference:**

- User can check option as per his preference



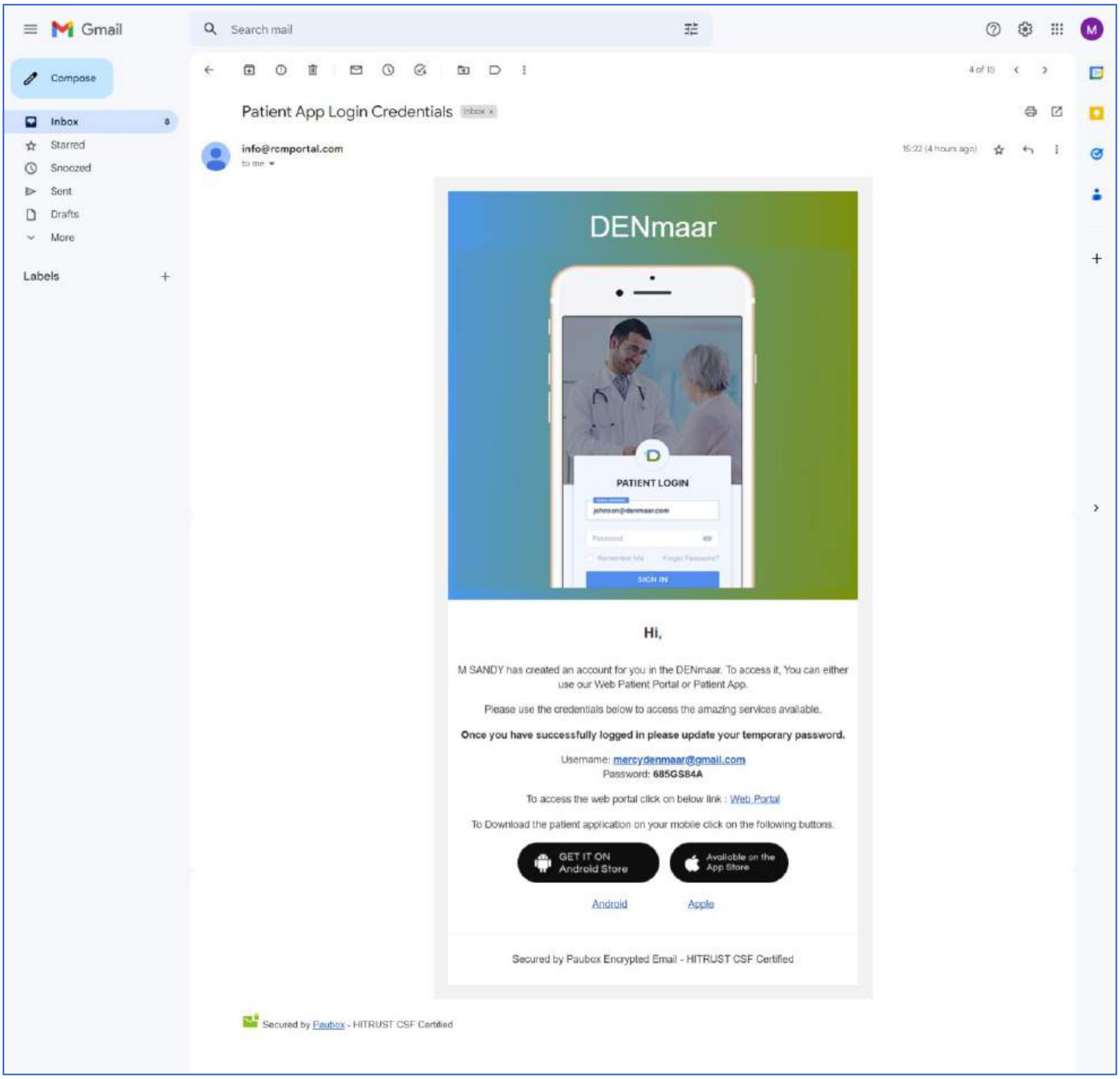

- After Filling all categories
- User can click on Save button , New Patient will be created in RCM

New Patient in RCM

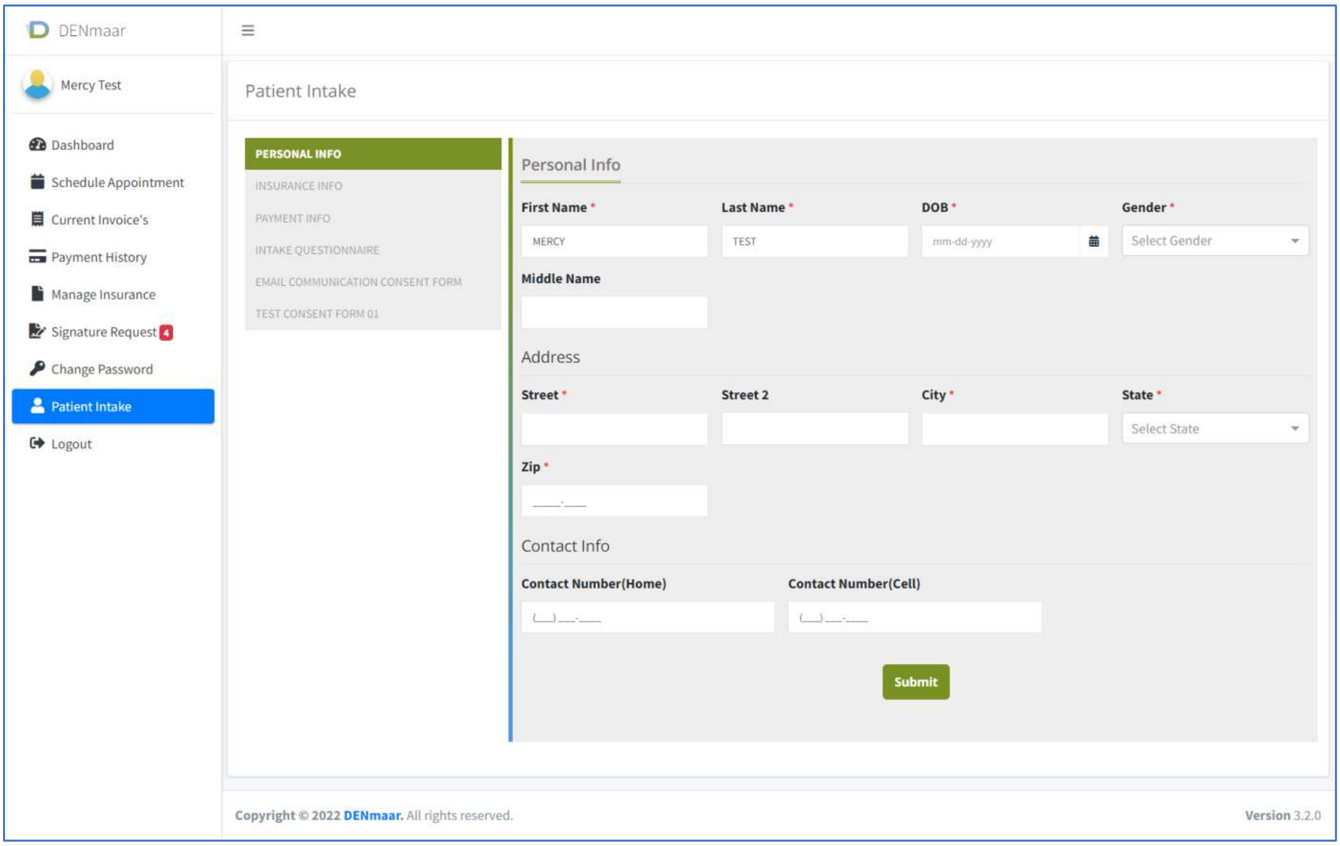



## 1. Patient Portal flow : [for point 2: I would like to fill all the patient info myself ]

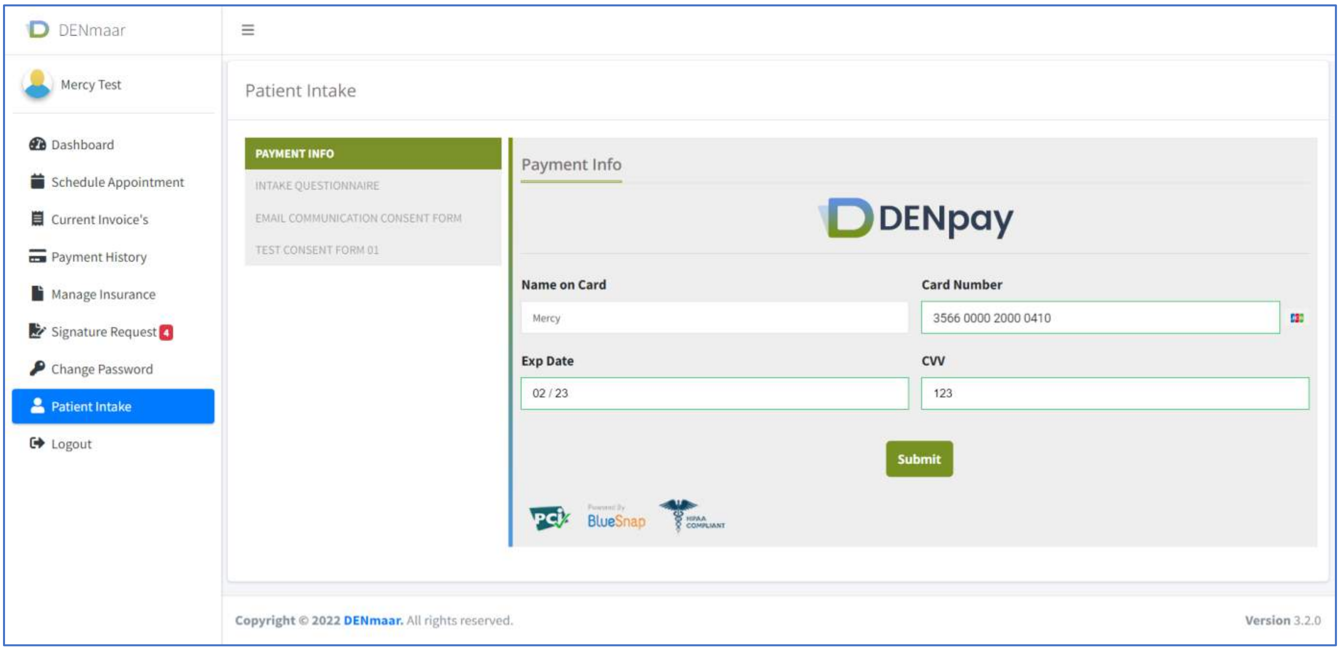
- If Patient is having email ID , After creating new patient in RCM , Patient will receive email with Patient portal credentials with Patient portal link , Username & Password
  Patient will have to login into patient portal using that portal details
- If Patient do not have email ID , then user will have to create new patient by filling all details in RCM. [I would like to fill all the patient info myself]




- After logging into Patient portal , user will be redirected to Patient Intake page where patients will be able to access the sent forms from RCM
- User will be able to see Payment Info, Insurance Info & other selected forms

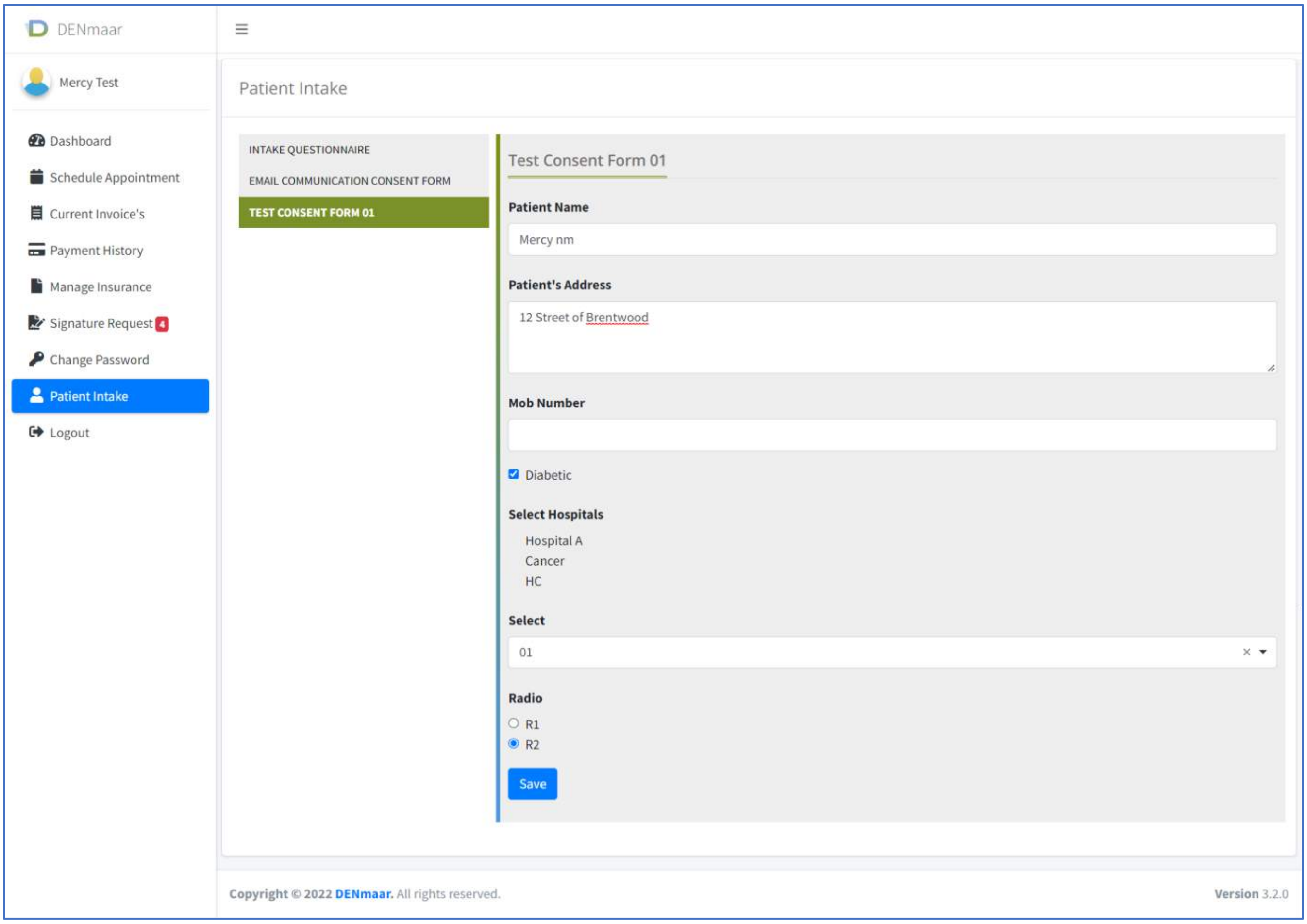



- Once Personal Info is submitted by User , Payment Info[next form] Form will be displayed



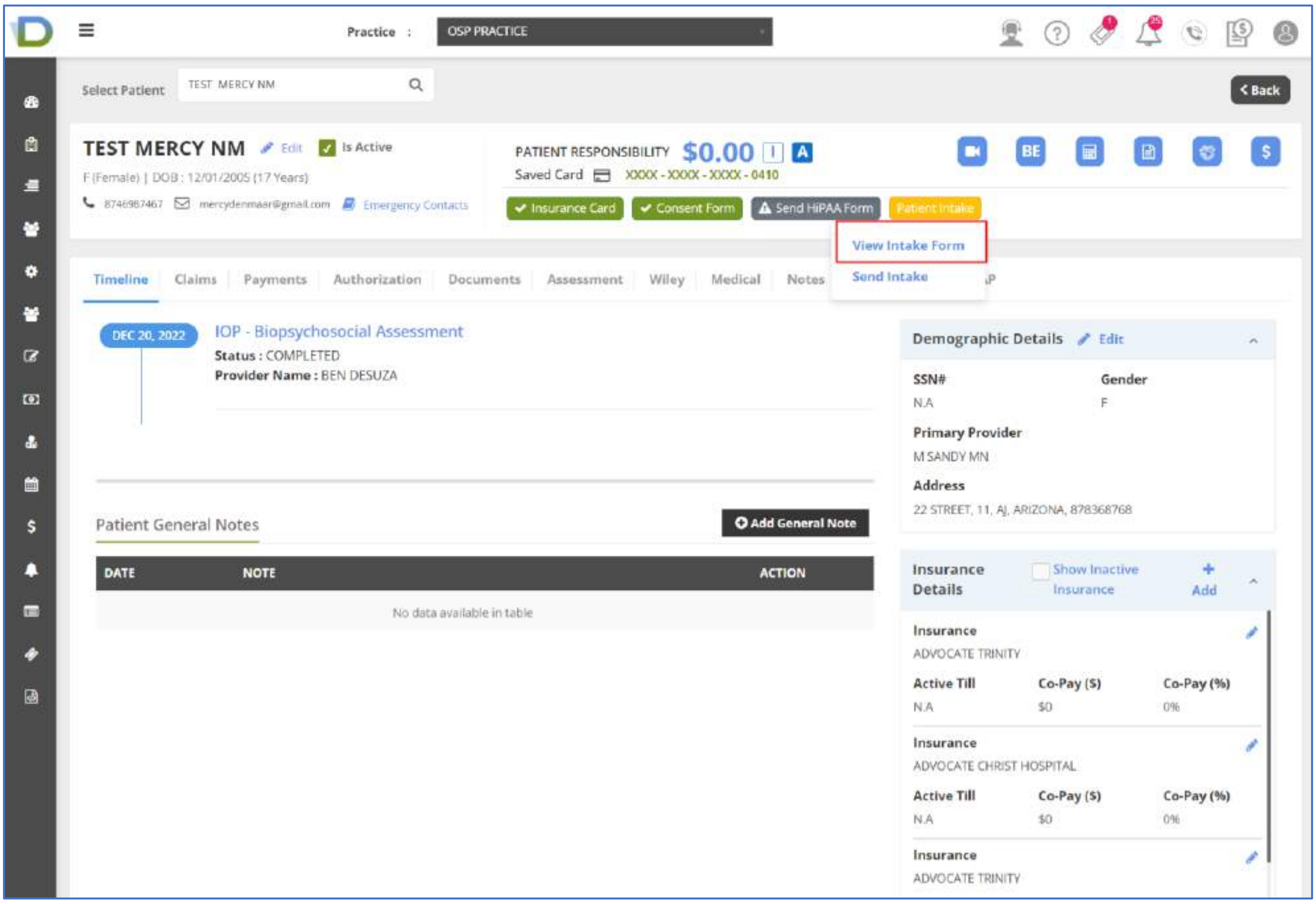

- After submission of Payment Info , Other Forms will be enabled for user to submit

- User can submit all forms from Patient portal

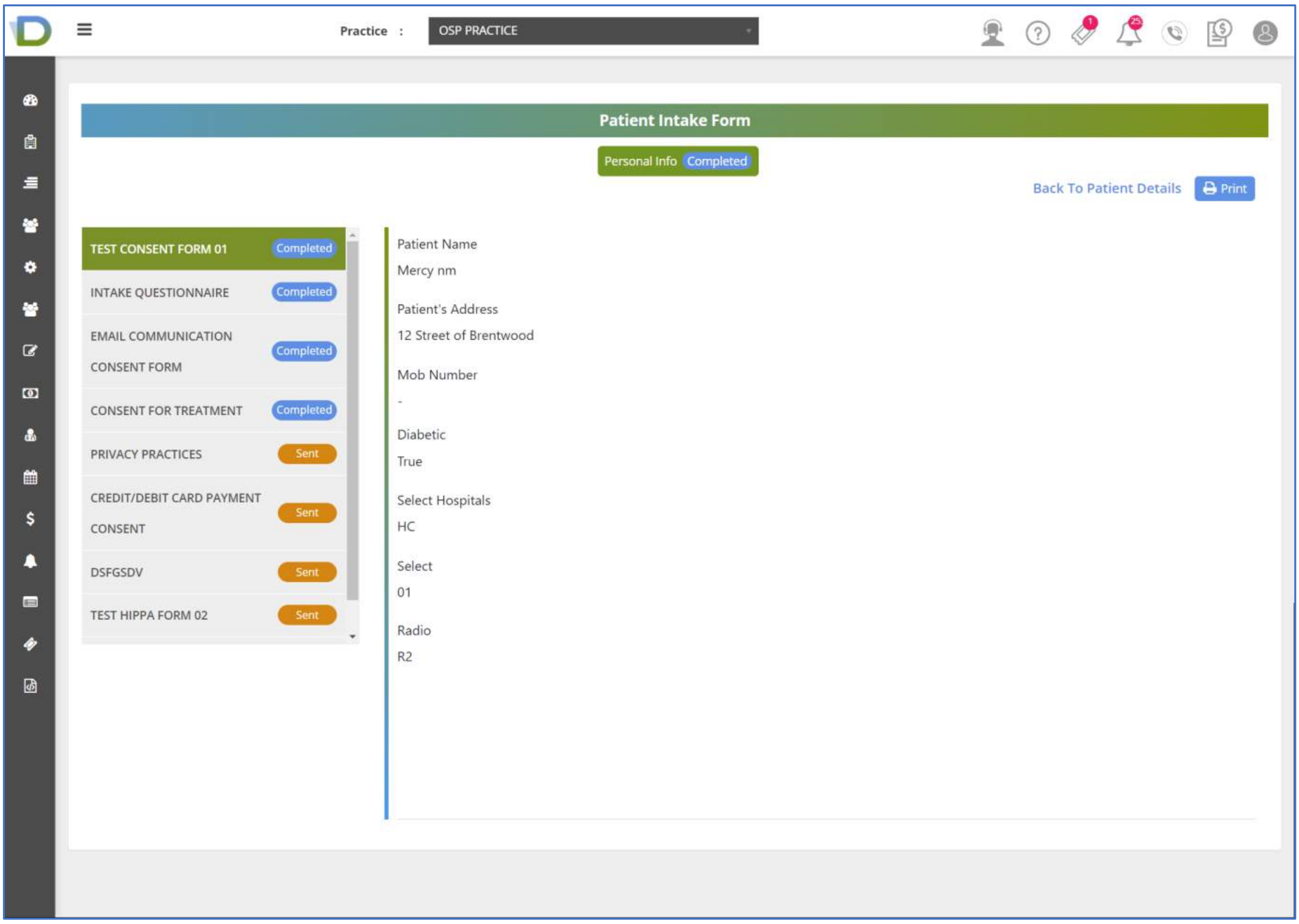


## After submission from Patient Portal ,User can review forms filled from Patient portal in RCM ->Patient Intake

- In RCM – Go to Patient's Demographics
- Go to Patient Intake
    a. User will have option View Intake Form & Send Intake
    b. Click on View Intake Form



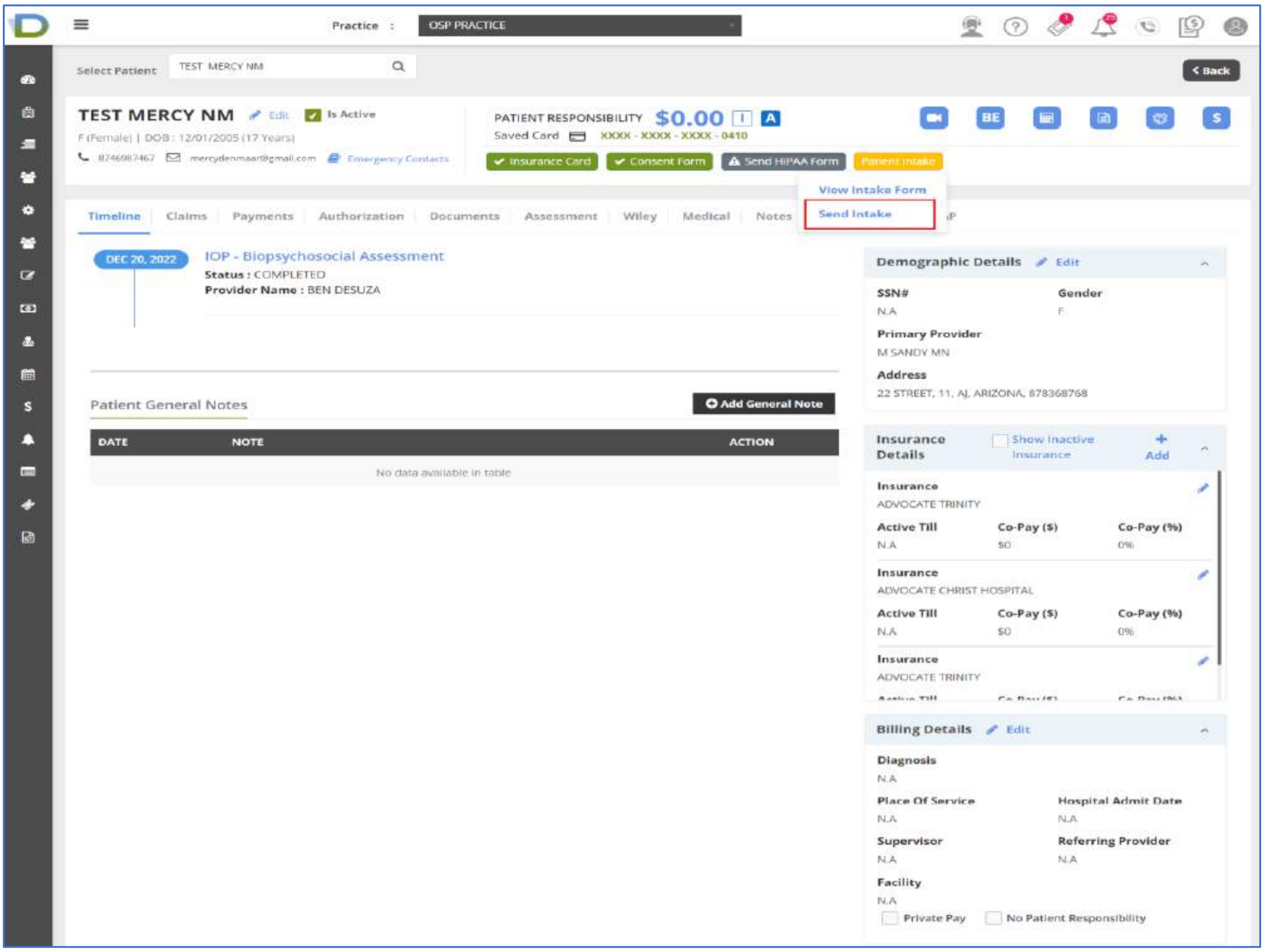
➢ Clicking on View Intake Form

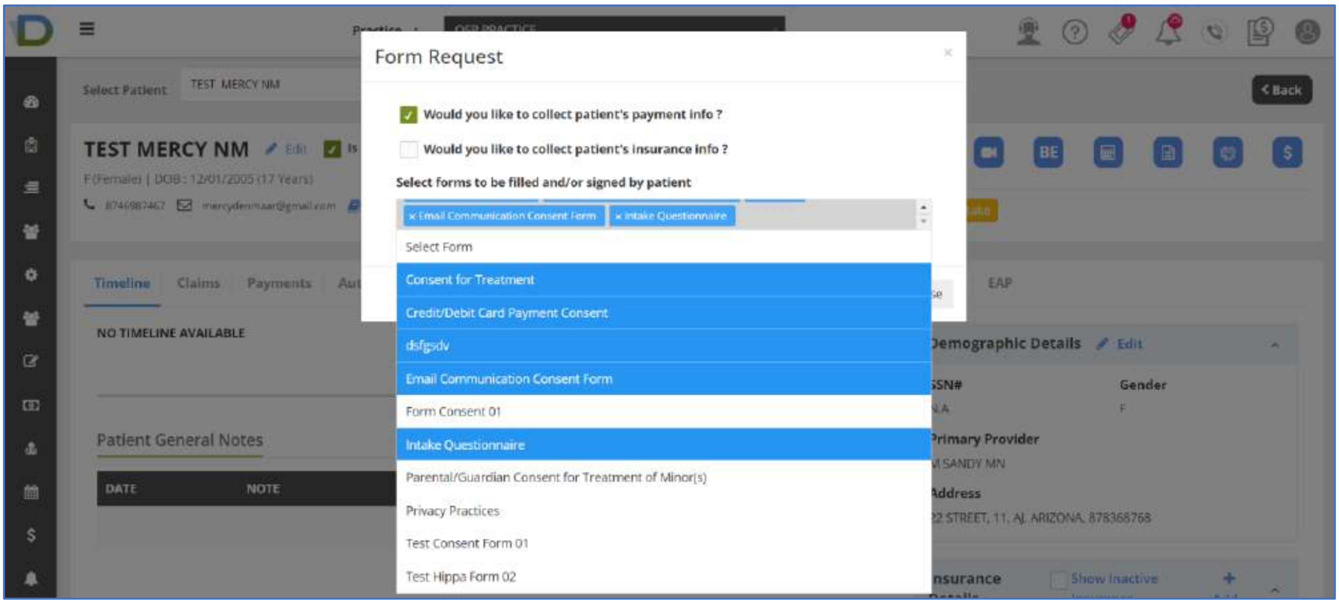



- Information Submitted from portal gets updated in Patient Intake Form
- Forms submitted from Patient portal will be in completed status & Pending forms will be in Sent status
- User can print submitted form from Patient Intake form.

2. If User wants to send form builder form or any extra form to new or existing patient then

➢ Go to Patient Intake -> Send Intake



- User can select forms to be sent to Patient Portal for submission and click on send button
- Forms will be updated in Patient Portal